DOCUMENT RESUME

ED 135 052 95 EA 009 158

AUTHOR Schultz, James V.; And Others
TITLE Winnequah School Case Study: An Individualization Alternative for Secondary Reform. Technical Report No. 403.
INSTITUTION Wisconsin Univ., Madison. Research and Development Center for Cognitive Learning.
SPONS AGENCY Bureau of Education for the Handicapped (DHEW/OE), Washington, D.C.; National Inst. of Education (DHEW), Washington, D.C.; Office of Education (DHEW), Washington, D.C.
PUB DATE Nov 76
CONTRACT NE-C-00-3-0065
NOTE 37p.; Report from the Project on Models for Individually Guided Education-Secondary; For a related document, see EA 009 159

EDRS PRICE MF-$0.83 HC-$2.06 Plus Postage.
DESCRIPTORS Case Studies (Education); Change Agents; *Change Strategies; Decision Making Skills; *Educational Change; *Educational Innovation; Educational Objectives; Educational Strategies; *Individualized Instruction; *Intervention; Middle Schools; Models; Program Planning; Secondary Education; Student Teacher Relationship; Workshops

ABSTRACT

This document describes the involvement of the Individually Guided Education/Secondary Project (IGE/S) with a Wisconsin middle school from March 1975 to June 1976. The guiding purpose was to conceptualize and implement a change process that would aid schools to become IGE places of learning. A sequence of change operations was followed and the activities that were carried out are presented. The five phases in this sequence were an awareness phase, a commitment phase, a changeover phase, a refinement and implementation phase, and a renewal phase. The focus for all activities in each of the phases was a target program of individualization that was cooperatively developed and subsequently implemented. This target program, its implementation, and the results obtained are presented. (Author)

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Technical Report No. 403

WINNEQUAH SCHOOL CASE STUDY: AN INDIVIDUALIZATION ALTERNATIVE FOR SECONDARY REFORM

by

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Report from the Project on
Models for Individually Guided Education-Secondary

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November 1976

EA 009 158

Published by the Wisconsin Research and Development Center for Cognitive Learning, supported in part as a research and development center by funds from the National Institute of Education, Department of Health, Education, and Welfare. The opinions expressed herein do not necessarily reflect the position or policy of the National Institute of Education and no official endorsement by that agency should be inferred.

Center Contract No. NE-C-00-3-0065

WISCONSIN RESEARCH AND DEVELOPMENT CENTER FOR COGNITIVE LEARNING

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- developing improved instructional strategies, processes and materials for school administrators, teachers, and children, and
- offering assistance to educators and citizens which will help transfer the outcomes of research and development into practice

PROGRAM

The activities of the Wisconsin R&D Center are organized around one unifying theme, Individually Guided Education.

FUNDING

The Wisconsin R&D Center is supported with funds from the National Institute of Education; the Bureau of Education for the Handicapped, U.S. Office of Education; and the University of Wisconsin.

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ABSTRACT

This document describes the involvement of the Individually Guided Education/Secondary Project (IGE/S) with a Wisconsin middle school from March 1975 to June 1976. The guiding purpose was to conceptualize and implement a change process that would aid schools to become IGE places of learning.

A sequence of change operations was followed and the activities that were carried out are presented. The five phases in this sequence were an awareness phase, a commitment phase, a changeover phase, a refinement and implementation phase, and a renewal phase.

The focus for all activities in each of the phases was a target program of individualization that was cooperatively developed and subsequently implemented. This target program, its implementation, and the results obtained are presented.

I

INTRODUCTION

PROJECT PURPOSE AND MANDATE

This case study documents the involvement of the Individually Guided Education/Secondary Project (IGE/S) of the Wisconsin Research and Development Center with a Wisconsin middle school from March 1975 to June 1976. The involvement was part of a developmental effort funded by the Basic Skills Group of the National Institute of Education (NIE) that was to find alternative approaches to individualization of learning for secondary schools (defined as schools covering grade levels 6-12).

The overall purpose of the IGE/S Project was to aid schools to become IGE places of learning. One of the activities IGE/S used to achieve this purpose was development of examples of varied individualization techniques and operating methods that different schools might draw on and apply to their own unique needs.

To develop such examples, the project formulated a model which was based on the assumptions in Appendix A and which is explained fully in a theoretical paper by Struve and Schultz (1976). Most simply, this development model calls for a three-stage, dynamic, interactive approach between the IGE/S Project and a few secondary schools interested in moving towards individualization. These three stages are (1) conceptualization or planning for interactive in-school work, (2) implementation or interaction of the preplanned conceptualization, and (3) a subsequent synthesis or dynamic integration of the project's conceptualizations and the school realities into a new conceptualization.

SCHOOL DEMONSTRATION PROGRAM

To pursue the project's purpose and mandate, a school that wished to implement IGE/S practices and procedures on a school-wide basis--a prerequisite for individualization in the IGE/S conceptualization--was selected, and the IGE/S facilitators worked with the school in moving toward its target of individualization. To implement school-wide individualization, the project staff worked with school personnel to develop their skills and techniques in the areas of planning and decision making, human development, and alternative conceptual knowledge appropriate to individualization. The school can best be served by providing its personnel with the kinds of process skills necessary to maintain appropriate dynamic change rather than providing them with piecemeal practices for innovations that may or may not be appropriate to their unique needs.

SEQUENCE OF CHANGE FOR THE DEMONSTRATION SCHOOL

A generalized sequence of operations was followed by the IGE/S Project in its work with the demonstration school. Basically there are five major phases in this sequence of change, represented graphically in Figure 1 (for a complete discussion of this sequence see Struve and Schultz (1976).

IGE/S BACKGROUND

The Wisconsin R & D Center had for ten years been involved in developing IGE as an alternative form of schooling at the elementary level (grades K-6). IGE is now being implemented in over 2,000 of the nation's schools. The IGE/S Project was initiated in part as a response to requests from the field for extensions of IGE to the secondary level and in part as a response to the many national reports calling for secondary reform.

The Winnequah case study was part of a comprehensive program of systematic change for secondary schools that was developed and being investigated by the IGE/S Project. For documentation of the overall effort of the IGE/S Project see Struve and Schultz (1976), Ellenz (1976), and Thomson and Koritzinsky (1976).

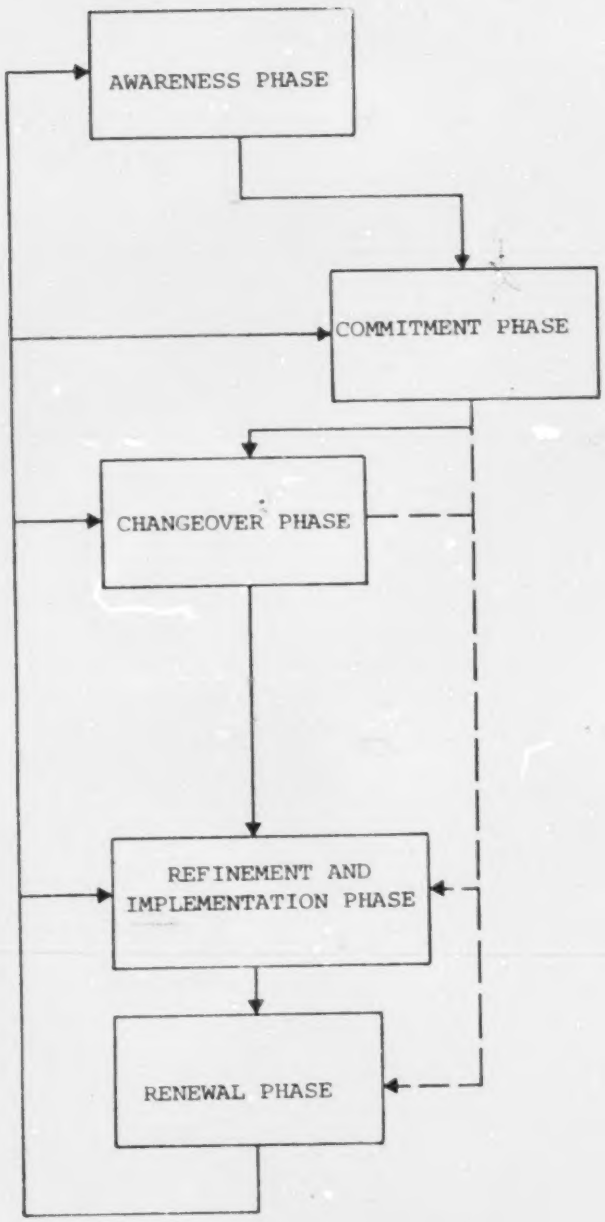
The IGE/S Project, including the Winnequah School program, ended in June 1976 with an NIE decision not to continue funding because "this work does not fit the grade-level, subject matter, or fiscal plans of the Basic Skills Group."

DESCRIPTION OF THE DEMONSTRATION SCHOOL

A Wisconsin middle school, Winnequah, with around 750 sixth, seventh, and eighth grade students and a staff of approximately 45 full- and part-time teachers, elected in June of 1976 to serve as a demonstration school for the secondary project.

Winnequah was chosen by what was essentially a self-selection process that began in March of 1975 with an area wide awareness meeting followed by subsequent meetings of interested parties. These meetings resulted in the establishment and implementation of a local school network consisting of three high schools and five middle schools. Winnequah, as the demonstration school, was also a member of the network. A full documentation of the network development process is given in Ellenz (1976).

Previous involvement of the Winnequah School with the IGE/S Project had been minimal. Three factors, however, seem relevant to the school's decision to work with the project: One, the Winnequah community had been involved with Individually Guided Education at the elementary school level for a number of years. Two, during 1974-75, a task force of school



STAGE PURPOSES

- to emphasize the process that obtains answers rather than to provide answers
- to begin the involvement of people
- to initialize a working relationship that allows for dynamic modification
- to provide for inschool capabilities for continued change and improvement
- to cooperatively define a changeover plan
- to develop a school's target plan for individualization
- to refine the target plan into an installed and operating program
- to refine the implemented program as the beginning of a continuing search for solutions

Figure 1. Sequence of activities for change.

teachers was set up to explore the possibility of IGE being incorporated at the middle school level. Three, previous work on school planning had been done by a community-teacher committee in 1972, the results of which are given in Appendix B.

II

AWARENESS, COMMITMENT, AND CHANGEOVER PHASE ACTIVITIES: DECEMBER 1974 TO AUGUST 1975

AWARENESS MEETINGS

At the same time that Winnequah School was involved in network development, there also were specific awareness meetings between the project and Winnequah School starting in December 1974 and running through the decision to hold a workshop in August 1975.

The purposes of these meetings were to explain the concepts and processes deemed beneficial for a school to move towards individualization, to answer questions the staff had about involvement, and to negotiate a working relationship between Winnequah School and the IGE/S Project staff.

Listed in Appendix C are sample school memos that identify the major meetings between the school and the project. In addition, the results produced from a half-day inservice run by the project staff on January 30, 1975, are given. Here the school faculty had a chance to try out aspects of the IGE/S Project's planning process by listing possible purposes, developing a purpose hierarchy, generating outcomes that achieve the selected purpose, and setting priorities on these outcomes. This same process was used again in more detail at the August workshop to develop the school's changeover program.

Initial commitment by Winnequah came in June 1975, when a memorandum of agreement was drawn up between the IGE/S Project and the Monona School District that called for the development of a change-over program consisting primarily of a six-day workshop to be held in August. The details of this memorandum are given in Appendix D. This agreement was to be in effect until after the August workshop, at which point a new contract would be renegotiated between the project and the school district, depending upon the Winnequah staff's interests for the following year.

Appendix D also lists the Board of Education members who approved the agreement and the names of the steering committee members who were to set up the August workshop.

SUMMER COURSES

In addition to the awareness meeting the IGE/S Project offered two courses for school staffs during the summer of 1975 on the individualizing of learning. The purposes for these courses were two-fold: (a) to

further develop a conceptualization of a secondary changeover program, and (b) to provide local network teachers with the opportunity to become more involved with the processes and the appropriate practices connected with IGE/S. Appendix E contains an overview of the courses and an outline of the material covered in each course. Important to the Winnequah case study is the fact that three Winnequah teachers participated in the educational administration course, two Winnequah teachers participated in the individualization course, and one teacher took a course in human development recommended by the project. These teachers were all members of the steering committee and thus gained the foundation necessary to aid in planning the August changeover workshop at Winnequah School.

WORKSHOP PLANNING

The steering committee and project personnel met four times during July to plan the six-day August workshop which would begin the changeover program at Winnequah School. The planning group used the IGE/S planning process to develop a school-specific workshop based on the needs and desires of the Winnequah School staff. Appendix F details the results of each planning session leading to the final outline of the sessions for the workshop.

WORKSHOP IMPLEMENTATION

From August 13 to August 20, for six half days, the IGE/S Project staff and the Winnequah School faculty worked cooperatively in developing a changeover program for the Winnequah school. Workshop emphases were on three areas of technical assistance for the faculty: human development skills, planning and decision-making skills, and conceptual knowledge appropriate to IGE/S philosophies. A detailed daily record of what occurred is given in Appendix G.

SUMMARY OF THE DEMONSTRATION SCHOOL PROGRAM THROUGH THE AUGUST WORKSHOP

Basically, the IGE/S demonstration school program represented a change process that attempted to take a school from its current status and cooperatively define a program that would lead to the implementation of teacher-to-student individualization practices. To facilitate this, the demonstration school program called for formative evaluation of a case study of the change approach used in the Winnequah demonstration school program. Included in this case study were two tasks: (a) an external evaluation that concentrated on examining the organizational integration of the IGE/S change program into the Winnequah School learning milieu, and (b) an internal-external evaluative combination in which the IGE/S Project specified and monitored the goals and objectives for its investment work.

Through the August workshop activity, the evaluation of the Winnequah demonstration school program consisted of four parts: (1) the results of the workshop, (2) the general objectives, (3) the IGE/S Project staff evaluation of the workshop, and (4) the external participant observer evaluation of the workshop.

Results of the Workshop--the Winnequah School Change Program

During the workshop, the Winnequah School faculty formulated its own target program to move them towards individualization. Complete details of all of the specific products they generated are given in Appendix H. Basically, this package, the Winnequah Middle School Workshop Results, consists of a focal purpose for the Winnequah Middle School, a series of "we agree" statements that the entire faculty agreed to as high priority statements for functioning, and a set of appropriate practices with five high priority programmatic efforts to be developed during the course of the 1975-76 year. Each of these five priority programs had its own timeline for planning, implementation, and evaluation, as well as a specific task force, composed of teachers, administrators, and parents carrying out the work.

IGE/S General Objectives

The IGE/S Project formulated a series of four major objectives and appropriate subobjectives for their involvement in the demonstration school program. These are listed in Appendix I along with an appropriate checklist for attainment or nonattainment of each objective and subobjective.

IGE/S Staff Evaluation

During the course of the workshop, the IGE/S Project staff evaluated its efforts at the workshop by obtaining daily staff reactions, recording snapshots of major factors of influence, and maintaining an accurate record of what occurred.

For the daily staff reactions, the IGE/S Project, as a group, spent 20 minutes after each workshop session discussing what worked, what didn't work, and what suggestions could be made to improve the workshop progress. These are listed in Appendix J.

Twice during the workshop, the IGE/S staff brainstormed and rank ordered a series of major factors of influencing the involvement programs or events at the workshop. These results are given in Appendix J.

The IGE/S project maintained an accurate record of exactly what went on in each session and what changes were made from the original pre-plan of the workshop. This is given, as noted above, in Appendix G.

External Participant
Observer Evaluation

The IGE/S Project hired a consultant to act as a participant observer during the workshop and to obtain information from an anthropological point of view concerning the effect of the IGE/S change program in its integration with the Winnequah learning milieu. This evaluation, carried out by a person present at all sessions of the workshop, consisted primarily of the person's observations but also included a random sample of interviews to obtain staff or teacher reactions to the workshop concepts. The results of this external participant observer evaluation are given in Appendix K.

III

REFINEMENT AND IMPLEMENTATION PHASE

At the August 1975 workshop the faculty of Winnequah School formulated a changeover plan that they wished to implement during the 1975-76 school year. Highlights of this plan follow (for a more complete description see Appendix H).

PURPOSE

The focal purpose (primary mission or aim) of the changeover plan was to develop a school program which develops specific competencies based on individual needs and interests.

"WE AGREE" STATEMENTS

To provide objectives for this purpose the Winnequah School faculty formulated high priority "we agree" statements (statements arrived at through group consensus) on how they desired to function during the 1975-76 school year. These statements covered the areas of the operation and organization of the school, student oriented learning programs, and home-school-community relations and communications.

PRIORITY PROGRAMMATIC EFFORTS--TASK FORCES

Finally, to guide the implementation effort the Winnequah School faculty established five high priority programmatic efforts, with a task force for each, to be put into practice at Winnequah School during the 1975-76 school year. These efforts were as follows:

Teacher-Advisor Program

A program to enable a group of students to meet regularly with an adult adivsor (teacher or administrator) to discuss problems, build communication, and provide both peer (student to student) and teacher-to-student support.

The U.S.S.R. (Uninterrupted Sustained Silent Reading Program)

A program aimed at increasing student reading skills and improving attitudes toward reading by having the entire school regularly engage in this activity.

Flexible Scheduling Program

A program aimed at developing a plan for improved organizational alternatives so that school operations are based on program priorities rather than staffing priorities.

Parent Conferences Program

A program to develop a schoolwide plan for improved communication between teachers, students, and parents.

Expanded Club Program

A program to extend the current activity oriented club program to allow for more student input and to increase student awareness of and interest in potential activities.

Task Force Work

For each of these programmatic efforts, a 1975-76 timeline was set. The task forces were composed of teachers, administrators, parents, and students and met at periodic intervals (usually twice a month). They were charged with refining and implementing the general guidelines that were set forth during the changeover workshop.

On the average, each task force had five to eight members in attendance at a meeting. Over the year membership changed somewhat because most meetings were held after school (3:30-5:00 p.m.) and some members had additives (sports, clubs, district committees) that required their participation.

The leadership within each task force also varied over time. However, usually one of a small group was the primary person who took responsibility for setting agendas, writing up the meeting minutes, involving special personnel (individuals with needed knowledge, such as the assistant principal for current student scheduling mechanisms) and generally pushing the task force forward. Many times members of these task forces made use of the variety of planning skills they had seen and used during the workshop. For example, most task forces re-did a purpose hierarchy for their particular program (e.g., see the Teacher-Advisor hierarchy or parent conference hierarchy). They also used brainstorming techniques for ideas and rating techniques for making presentations and flipcharts so all members could focus on the topic at hand. However, as a whole these task forces did not consistently use the planning skills in a systematic way. Often the groups fell back on more conventional techniques (e.g.,

general discussion, arguing, presenting ideas without writing them down, asking who else has done it so they could get a "proven package," etc.). During these discussions, the task force members became increasingly unsure of themselves and unsure of what they were supposed to be accomplishing. To some extent, during the course of the year, various individuals would attempt to bring the task forces back on task through statements such as "what purpose are we trying to achieve," "remember 'we agreed' to that in the workshop," and so on. For the most part, the groups lacked the awareness and the skill necessary to break old patterns and move on to a more effective planning mode.

When taken as a whole, the decision-making processes of the task forces covered a broad range and indicated a concerted effort to involve, as much as possible, all interested or affected parties. For example, many of the task forces (flexible scheduling, teacher-advisor, clubs, parent conferences) surveyed the faculty on their desires, on suggested alternatives, on time schedules, and so on. Some surveyed students on their choices (e.g., clubs they wanted or choice of teacher-advisor). In addition, the groups passed out summaries of their work to the rest of the faculty, wrote articles for the school-community newsletter, and called special faculty meetings to make presentations and obtain faculty feedback.

Of all the task force work, the effort on shared decision making was probably the most concerted. For example, each time a task force was "set" in its "final" plan, an all-school faculty meeting was held and a consensus process (the "we agree") was used to make final modifications before any plan was implemented.

Even though there was a concerted effort at shared decision making, problems still arose. The first problem reflects directly on one already mentioned: the task forces, and subsequently the school as a whole, never really internalized the planning techniques that were at their disposal. Thus, while the individuals were truly interested in shared decision making they did not know how to go about it. Instead of agreeing on a purpose, weighing alternatives, and choosing the direction and specific action that best fit these, the faculty would often end up in arguments in which various individuals made specific points that the remainder of the faculty neither understood or heard. As opposed to the changeover workshop, very little process leadership was supplied and consequently the meetings would drag, the topics would vary, and the procedures (e.g., setting priorities, evaluating, listing alternatives, discussing possibilities) would become so intertwined that it was difficult to identify what if anything was accomplished.

The second problem was external to the school in the beginning, but in the end became so intertwined in the changeover process that it caused complex problems and confusion. The basis for this external problem was a widespread faculty attitude that the "powers that be" were unfavorably inclined to any real commitment to change at the school. At times, these powers were identified as the community, or the school board, or the district administrator, or the pre-eminence of the high school in the district. Even though the changeover process instilled a genuinely positive attitude in the faculty about themselves and what they could accomplish, this underlying skepticism remained. During the early phases of the task force work (September

to December) these powers were pointed to as reasons for not continuing the programmatic efforts. For example: "The community was not really interested in a teacher-advisor program," "the parents will not come to parent conferences," "the high school needs dictate our staffing arrangements," "the school board doesn't really want us [the teachers] to specify a schoolwide program," "the students don't want to read and are not really interested in clubs." Paralleling these feelings of external powers antagonistic to the school efforts, teachers felt overworked and too little compensated or supported. Comments such as "we're trying to do too much," or "we have too many meetings," or "how do we do this new activity and still do all we have to do now," or "I wasn't trained to do _____ (e.g., be a teacher-advisor or run clubs)" were common throughout the year. Nevertheless, the programmatic efforts continued to move ahead and the task forces implemented a number of their plans (i.e., U.S.S.R., teacher-advisor, and clubs).

In March the background powers finally came through with their anticipated action. The school district, faced with declining enrollments, was forced to make personnel cuts for the forthcoming year (1976-77). Up to six people were projected to be cut from the faculty. Although there was necessarily confusion over how the specific cutbacks would be implemented, the general issue of cutbacks was interpreted by many of the faculty as the last straw. That is, they would not continue taking on more responsibility and attempting to improve the school program when they were not being supported by the central administration. The cutback issue became most intertwined with the proposals from the flexible scheduling task force--in all probability because it was the recommendations of that task force that were before the faculty when the issue of cutbacks arose. Previous proposals from other task forces had already been presented and implemented. So the foremost issue vis a vis staff cutbacks was flexible scheduling. For example, the task force recommendations were seen as a way to maintain the current staff level. When that didn't happen the attitude of not doing flexible scheduling because the cuts were made became predominant.

The overall issue of cutbacks and its effect on the change program was never fully resolved. Then the IGE/S Project lost its funding which caused further complications. The resulting state of affairs is discussed later, under the wrap-up inservice program.

IV

CHRONOLOGIES FOR THE PRIORITY PROGRAMMATIC EFFORTS

TASK FORCE ON THE UNINTERRUPTED SUSTAINED SILENT READING PROGRAM

The Uninterrupted Sustained Silent Reading Program (U.S.S.R.) developed out of a perception by faculty members that students read when they have opportunity and actual time set aside to read and when they are encouraged to read by their student peers and teacher leadership. Choice of reading material was left to each student and teachers were encouraged to "model behavior" by reading during the specified time period.

A task force was set up to determine whether U.S.S.R. should be implemented school-wide or only on the classroom level and to develop guidelines for teachers and students to follow regarding implementation of the program. At the inception of the program, task force members didn't see any basic connections between their group and the other groups. One individual acted as group leader and facilitated the seven member decision-making process in a decisive and on-task manner. The individual members shared their previous experience with other silent reading programs and discussed options that could be developed for a school-wide program and how to present these possibilities to the faculty. From the inception, the group decided not to deal with the irregularities and exceptions. They presented options to the faculty in the form of a survey and tried to focus upon an "ideal" Winnequah school-wide silent reading program.

The program was implemented according to the timeline established at the August preschool workshop, so that by mid-October the program was used school-wide for the first 10 minutes of the school day in the homeroom. Shortly after implementation, an evaluation was obtained by this task force from students and teachers. Most reactions were positive but some objections were that the time was too short, that certain areas, such as industrial arts and home economics needed materials available, and that time was taken away from the areas outside of the common academic periods. As implementation proceeded the leadership of the group came to be more diffuse, but always this group planned ahead, stayed within an agenda, and completed tasks according to a previously agreed upon time commitment.

The task force was involved with improving and refining the U.S.S.R. program. For instance, they were concerned with ways to get total school involvement, with the availability of materials, with the time

period set aside for the year, and with ways to expand the program for the next year. The group not only considered long range goals, such as submitting proposals to the faculty in order to guarantee that U.S.S.R. time would be placed on the academic schedule for 1976-77, but also immediate concerns, such as activities that would generate interest in reading. During the year they arranged book exchanges, reading posters, and presentations on their progress at general school-wide meetings.

The task force members were interested in what they were doing, saw themselves as having a function throughout the year, and did their tasks thoroughly and cooperatively. They were concerned with the broader need for U.S.S.R. beyond the immediate goals of the program--reading only for its own sake, reading as integrated into the curriculum, the integral part of reading in real life rather than an isolated part of school curriculum, and the library as part of the school. In general the group viewed reading as a tool on which future learning is built.

Assistance from the Center was almost nonexistent, other than observing the continuing change and improvement of the U.S.S.R. task group. The task group was relatively productive, cohesive, and autonomous. Implementation of the reading program was easily carried out by each homeroom teacher--it took no planning time from the teacher's daily schedule. Overall, the program was viewed by faculty as important, easy to implement, and necessary to continue. Therefore the first twenty minutes, two days a week have been set aside in the homeroom period during the 1976-77 academic schedule for the U.S.S.R. program. See Appendix L for copies of the survey and memoranda developed by task group members.

TASK FORCE ON THE TEACHER-ADVISOR PROGRAM

Winnequah faculty generally perceived a need to have a program which would enable students to develop understanding of, opportunities to experience, and skill in interpersonal relations, responsibility, values, and decision making. This program was given high priority by faculty at the August pre-school workshop.

Initially they set up planning meetings to detail how such a program would be conceived and implemented. From the beginning this group had active participation by three parents and seven faculty members. The school guidance counselor consistently assumed leadership. The group worked toward the goal of implementing a teacher-advisor system by January 1976. Various decisions were debated, such as whether groups should cross grade lines, whether it is necessary to take time from academic areas to schedule teacher-advisor sessions, and whether long-term relationships are of primary importance between a teacher and an advisor.

This teacher-advisor task force asked for considerable interaction with the Center staff; our coordinator facilitated the early development as the group determined its purposes and the subsequent activities related to achievement of these purposes. The four basic functions of the Teacher-Advisor Program were determined to be (1) human development, (2) planning and assessment, (3) reporting to parents, and (4) personal

problem solving. It was from these four functions that the Teacher-Advisor Program was formulated. This group also decided in its initial implementation to focus on human development and trust-building activities. The group became involved in brainstorming on (1) possible organizational characteristics of the program, such as assigning each teacher to an advisee group, keeping students of the same grade together for three years, and having the sessions at the time when the greatest number of teachers are available in the building; (2) alternative resources for the program, such as a handbook for each advisor, an in-service meeting on small group facilitation skills, developing and making available at the school at least one in-house expert; and (3) suggestions for alternative activities for the program, such as role playing, structured communications exercises, and activities to build trust.

By October 1975, discussion had evolved to the point where task group members were deciding the length of time of sessions, how to assign advisors and advisees, and what activities to suggest initially. Throughout this process questionnaires were submitted to the faculty to get their reactions and recommendations, and information sharing and discussions were encouraged at faculty in-service meetings. (See Appendix L.)

In November 1976 three members from this task force went to a one-day workshop in Minneapolis to get further exposure to other Teacher-Advisor programs. The teachers received a lot of materials and a few tips, but they generally felt that they were further along with their implementation than others present at the group. They felt other teachers in attendance needed to be convinced that teacher-advisor was a good thing and that things were not clearly defined for those already committed. Soon afterwards the three members who attended the Minneapolis conference held and led an in-service on Teacher-Advisor implementation. The Winnequah School guidance counselor was familiar with a successful Teacher-Advisor program in Cedarburg, Wisconsin, and asked the counselor there to present their program. The Winnequah task force felt that the Cedarburg experience would be helpful in their implementation strategy.

An additional in-service was held to present simulated activities related to the teacher-advisor implementation. The Center coordinator facilitated and planned specific activities as a "show and tell" technique. At this point the faculty raised issues such as a student's right to privacy, whether teachers are part of the student group, and how teachers should be called during their session.

As the implementation deadline drew near, there was more reliance on outside resources to enrich the Winnequah Teacher-Advisor Program and involvement of parents became more intense. A strong commitment was shown by group members to turn their plans into successful implementation, and involvement from Center staff became minimal. Lines of communication were kept open through faculty meetings and written questionnaires to faculty.

The Teacher-Advisor task force members did not appear to have experience in meeting skills. For instance, they tended to digress from their topics and rarely approved an agenda.

An outstanding contribution to the total planning effort was the presentation by the Cedarburg group of their Teacher-Advisor program. They discussed how it originated, what they did about lack of total faculty commitment, how teachers feared talking directly with students, how the program united their faculty, how there were changes and improvements being made such as operating support groups for teachers and more available resources. This had the following effects on the Winnequah faculty: fear of the Teacher-Advisor Program was openly admitted, it was suggested that faculty support groups be formed, and the majority voted to go ahead with the program implementation.

The program was implemented in early February 1976. The reactions by students were generally good. When asked about the program by Center staff, students responded: "It's fun, I wish it was longer"; "When I don't want to talk about things I can pass"; "It's too brief."

Teacher reactions were mixed. Shortly after the program was implemented, more complaints arose. A questionnaire was circulated by the guidance counselor about whether to continue or discontinue the program and the popular faculty opinion was to dissolve it. Teachers seemed to feel their groups weren't operating effectively because students saw it as a game. Others felt the program required too much planning time. Some teachers felt incompetent to handle this area of student development--they felt they had no training and felt awkward trying to get their groups to move ahead. Others complained the time was too short to really get into the program. Some objected to losing time from their academic class schedule. Others felt that dealing with the affective domain in a specific time period was artifical and that this area of student development should be continued and taken care of in the normal academic period. At this point, the principal interceded and stated that the faculty was committed to completing the 1975-76 year with an operating Teacher-Advisor Program. There was some faculty resistance and antagonism to this "administrative mandate," but the program continued.

The task force submitted a proposal for a 20-minute period, twice a week, to be set aside for the next year for continuing the Teacher-Advisor Program. This was arranged by a scheduling committee and was to be part of an early morning activity. The faculty met on the last day of school to further discuss and plan for the next year's arrangements for the program. A sub-committee was set up to work out final details. An important connection was made with the Parent Conference task group, which had been associated as a separate entity from Teacher-Advisor. It was agreed to combine these two task groups and integrate parent conferences with the Teacher-Advisor Program. This was an important decision which had not been dealt with previously. Planning documents, staff memorandum, and handbook information are included in Appendix M.

TASK FORCE ON THE FLEXIBLE SCHEDULING PROGRAM

This task group formed out of the August pre-school workshop. It was generally felt that in order to meet student-specific interests and needs there had to be more flexible daily scheduling, more individual

teacher planning time, more intra-team level planning and longer blocks of time scheduled for academic subjects. This task group came as a response to a long range goal regarding flexible school organization and operation. It was the responsibility of this task group to plan alternative ways to meet this goal, to present them to the faculty, to set definite targets by January 15, and to have a final plan for a more flexible schedule by the end of the present academic year. At the first general meeting this task group strongly emphasized contact with other task groups in order to develop closer interaction, mutual understanding of development and firm awareness of other groups' scheduling needs.

Previously, scheduling was a responsibility handled totally by the administrative staff, so for Winnequah faculty this proved to be a new and complex experience. They requested extensive input from IGE/S personnel. Their early meetings were spent discussing alternatives to enable a flexible scheduling plan. From this discussion three sub-groups were formed. One considered the present schedule; they looked at what already existed in order to understand it and determine what was liked or disliked by the faculty. A second sub-group considered block-modular scheduling alternatives; they investigated block or modular scheduling possibilities and various interdisciplinary approaches for Winnequah School. The final sub-group reviewed alternative programs in other schools by both visiting and reading about them. The ultimate target aimed for was blocks of time which allowed for more flexibility in scheduling students.

The task group was primarily composed of special and sixth grade teachers. This proved to be a disadvantage to the school-wide development as the idea of flexible scheduling needed to be further clarified and understood by seventh and eighth grade faculty members who had a limited perspective regarding how such programs could be put into operation. This was due largely because the seventh and eighth grades were organized by subject and age-graded.

There was limited leadership and conceptual or operational knowledge regarding flexible scheduling possibilities or alternatives. Therefore, leadership was supplied by Center staff, through proposals and information dissemination.

The rest of the faculty was involved through questionnaires, discussion at faculty-wide meetings, and alternative proposal presentations. The members also felt that as they progressed it was extremely important to systematically meet with and educate the seventh and eighth grade teachers. The discussion generated within this task force was outstanding and over time substantive discussions were carried out.

The school principal strongly supported the block schedule concept and encouraged progress toward this alternative because he saw it as a way to make the team structure, which he had set up two years previously for the sixth grade, become operative. This team structure obviously facilitated flexible scheduling; the group shared their experience at general faculty meetings. New knowledge of alternatives was contributed by an eighth grade teacher after he attended the Minnesota Facilities Conference where he visited open schools.

This task force also focused on the operational inadequacies of the team structured school organization. The teams had never really been operative and tended to break down according to traditional subject and grade divisions. This was because (1) teacher training was centered on the development of the subject rather than the student; (2) teachers were fearful of change, particularly the seventh and eighth grade teachers; (3) the administration did not help to operationalize the team structures; and (4) the general faculty felt they had no control in the decision making process.

Ultimately, the flexible scheduling group became the focus of all the five task forces. Their task was even more complex because they lacked conceptual and organizational alternatives and planning skills and because they did not have the input and understanding of the seventh and eighth grade teachers. They became embroiled in controversy when flexible scheduling was used as a rationale for keeping the current staff levels and declining enrollment was used to justify cutting faculty positions. This task force became the focus of substantial debate and eventually the whole idea of flexible scheduling was dropped.

TASK FORCE ON THE EXPANDED CLUB PROGRAM

The club program carried on an activity from previous school years. Formerly, the development and implementation of clubs, including teacher assignments, were administrative decisions made by the assistant principal with little or no faculty input. At the August workshop the faculty felt generally favorable toward having after-school clubs all year round. There was general agreement by the faculty and parents to improve student-oriented learning programs through an improved club program. A task force was deemed necessary to plan for this program and a January target was set for club program implementation.

Members felt that the Teacher-Advisor task force might at some future time develop cooperative interaction with the club program task force since both these groups focus on the human development aspect of student life. In its early stages leadership was diffuse and little attempt was made to make meeting agendas or formalize decisions. This task force was unique in that its members believed it was necessary to include students; it was the only task force of the five to do so. From the beginning, a few group members showed interest in obtaining some of the process skills that were demonstrated at the August workshop by the IGE/S staff; yet they stated they needed no assistance from the staff. They generally had little experience with and understanding of the process skills that could be used to run a meeting, make decisions, or set criteria. They would ask IGE/S staff for information and allude to "we agree," purpose hierarchy, and the need for involvement of students but seemed confused as to the uses of these tools or how to carry them out effectively. In addition, they generated good ideas as a group but rarely wrote down the information in order to continue development at later meetings.

Their progress was slow in the beginning, but by early November they started to develop more concrete plans. When the club program was presented to the faculty at a general meeting, there was resistance and disagreement from them. The task group was forced to make changes in their original proposals and to reassess their planning and implementing strategies. Factors that needed further refinement included club advisor assignments, amount of time, staff choice in decisions, scheduling conflicts, and the need for involvement and participation of parents. One group member began to assume more leadership and provided the group with more structure. More decisive agendas were established, decisions were made, and the members' reactions (including students) to choices and decisions were solicited. There was a general amiability and members respected each other's decisions. It was obvious when observing the group that student opinions were considered valuable. Another group member provided facilitation skill through such techniques as paraphrasing, writing out statements, and getting agreement on the priority of decisions.

A mini-club program was finally implemented during the spring--much later than the January deadline which had been set at the August workshop. Faculty reaction to the program continued to be mixed, as it had been in previous years. Some faculty members objected to the club selection process, others felt inadequate to lead the clubs to which they had been assigned, others felt it was simply a "play time" for students, and others felt that there were too many students signing up for popular clubs and that these were unmanageable. The task force did not solicit formal faculty reaction. The decision about whether to continue the club program was left until fall.

TASK FORCE ON THE PARENT CONFERENCE PROGRAM

This parent conference task force was formed from the following suggestions for improving school-community relations from the faculty and parents at the August workshop: (1) to have parent conferences continued into seventh and eighth grades, (2) to involve students in student-parent-teacher conferences, (3) to have teachers contact parents at least once a semester, and (4) to develop better public relations within the school community. The participants formally agreed to develop a program of parent conferences for seventh and eighth grade students which would provide opportunities for parents, students, and IGE/S staff to meet with a team of teachers responsible for the academic programs of each student. It was also agreed to tie the seventh and eighth grade parent conferences into the teacher-advisor program--workshop participants felt there were definite connections and interrelationships between the two groups.

From the beginning this task force requested input and involvement from Center staff. The group also had a number of active parents who participated throughout its planning phase. It was directly affected by teacher contract negotiations, which needed to be finalized by October 1.

The group began its activities by arranging its purposes into a hierarchy and then generating approaches to the problems. In general their meetings tended to lack leadership, and members were vague about which tasks to work on. As they proceeded, they presented their planning to the faculty at general meetings for acceptance. They used written questionnaires and reports to obtain reactions to specific suggestions and to give general information to all faculty.

Within the group there were certain faculty members who seemed to be afraid of parent conferences or who felt that they were useless. These faculty members proved to be a very negative influence on the group's development. The group in its initial development decided to break into two subgroups, which caused communication gaps. As one subgroup considered various ways to carry out parent conferences, the other was concerned with contract negotiating items. Until November there was a tendency to discuss irregularities rather than make choices of ideal solutions in order to begin detailed planning.

In late October the group expressed interest in knowing what other schools were doing with parent conferences. The Center provided assistance by bringing in materials and information from other schools. In addition, faculty brought information regarding programs they felt would fit well into the Winnequah School scheme. There was also discussion of including the sixth grade faculty with the seventh and eighth grade common inservice time. This was important for combining the total middle school faculty into a more collective and integrated schedule; up to this time, the sixth grade existed as a separated and isolated entity within the school operation.

In late November, a faculty meeting was held and the need for relating the teacher-advisor program with the parent conference program was presented. The group's program plans were further discussed in terms of purposes, criteria for selection, and various descriptors of the purpose. But on the whole, the group had difficulty making decisions, presenting options, and getting information circulated.

They had a January deadline for presenting how parent conferences were to proceed. Other faculty members began to show more informal leadership skills and led specific discussions regarding how to proceed with presenting the parent conference alternatives, and listing the advantages and disadvantages of each. This group consistently gave consideration to the involvement of the sixth grade faculty. Among the options were a school-wide parent conference evening and team outreach to parents through methods agreed to by team members. Generally the group demonstrated little unity on the decisions they tried to make.

A member of the task force presented the ideas to a general faculty meeting in March. The faculty voted to have a school-wide parent conference evening in the 1976-77 academic year. They also agreed to include the sixth grade teams with the seventh and eighth grade schedules. Each team of teachers could also schedule parent conferences as they felt it necessary. They could choose telephone contact, face to face conferences, or notes home. What developed was a genuine commitment to bring together parents and teachers as a vehicle for better student education and communication between home and school. The full faculty agreed upon a fall 1976 implementation deadline.

V

CHRONOLOGIES FOR NON-TASK FORCE INVOLVEMENT

At the same time that the IGE/S Project was working with specific task forces at Winnequah School, the project was also involved with the school in other ways. These included participation in regular school and district events, special project and school events, and evaluation of the change program at Winnequah.

PARTICIPATION IN REGULAR SCHOOL AND DISTRICT EVENTS

These activities were directed towards having the school accept the IGE/S Project as a regular part of its operations rather than an external agent only interested in its own programs. The activities included attendance at regular faculty meetings which were held once a month, after school (3:30-5:00 p.m.). The reason for attending these meetings was to have project personnel be a visible part of the school and to gain additional information about the interests and concerns of the faculty. Approximately seven faculty meetings were held between September 1976 and March 1976; project personnel attended five of these. The only active role played by project staff at these meetings was to occasionally announce other education-related events (e.g., conferences, special meetings).

The IGE/S Project was also involved in a few district activities where the Winnequah School change program, the task force work, and the general perspectives of individualization were explained. For example, during September 1975 project personnel assisted Winnequah School teachers and administrators with presenting to the school board the results of the August workshop and the proposed programmatic efforts (the five task forces) for the 1975-76 school year. This meeting resulted in a second memorandum of agreement between Winnequah Middle School and the IGE/S Project that specified a period (September 1975 to June 1976) of cooperative involvement. During January 1976 all members of the school board reviewed copies of the IGE/S Project's papers (see titles listed in the introduction). In this way the school board was kept abreast of the total perspective and program of the IGE/S Project's efforts as well as the work ongoing at Winnequah School.

In March 1976, the project also presented information and answered questions about the Winnequah School change program to the district administrators' meeting which included principals of both elementary schools, representatives from the high school, and the superintendent. Again, the emphasis was on the total secondary program as well as the specifics of Winnequah School.

Finally, during the course of the year project personnel met informally with teachers to talk about how the various task force efforts were going, what concerns the teachers had, and different methods and approaches to individualization. These again were purposeful efforts by the project to remain visible, gather information, and develop working relationships with as many teachers as possible. Both out of class and in class meetings were held. For example, project personnel talked with teachers in the halls, in the faculty room, after school, at special events, etc. and participated in and observed regular classroom periods.

PARTICIPATION IN SCHOOL EVENTS

The IGE/S Project was involved in additional school events. For example, project personnel were in attendance at three of the four (half day) inservice days held by the school. The first inservice (September 1975) was used to carry out task force work; project personnel acted as resource persons for the various subgroups. Part of the second inservice day was used by the teacher-advisor task force and project personnel to demonstrate activities that could be used in running a teacher-advisor group. The third inservice day (January 1976) was used to have teachers from Cedarburg (Wisconsin) Middle School explain their teacher-advisor program.

During mid year (January 1976) the IGE/S Project held a refinement meeting for the school faculty, administration, and parents who had been serving on the various task forces. This meeting was to provide an opportunity for the entire school to get together and assess the work done between September 1975 and January 1976 and make any changes or modifications deemed necessary. The agenda for that meeting appears in Appendix L. Also a questionnaire was handed out that asked participants to rate their attitudes on a variety of school issues and had them comment on the five task force efforts. The results are given in Appendix M.

EVALUATION OF THE CHANGE PROGRAM

The IGE/S Project continued the evaluation program that had been tried out during the August workshop. It was clear that such a complex planning and change process required comprehensive evaluation if useful information was to be obtained. Thus, after a series of planning/discussion meetings with R & D Center personnel, it was decided to obtain an external participant observer evaluation which would concentrate on encouraging the organizational integration of the IGE/S Project's change process into the Winnequah School learning milieu, and document the IGE/S Project's efforts with Winnequah School during the 1975-76 school year.

A separate report (Popkewitz, 1976) describes the results of the external evaluation. A description of the evaluation plan is given in Appendix N.

VI

WRAP-UP INSERVICE--RESULTS AS OF JUNE 1976

During the spring of 1976 the IGE/S Project continued its involvement with the Winnequah School task forces and in addition was formulating plans for the next school year's (1976-77) work. A major problem area was the need for inhouse (school personnel) process facilitators. The project planned a two week intensive training course to be held in June 1976 for interested school personnel (a minimum of two per school).

In addition the project was working on the following questions:

1. How can an adequate description be given for an IGE/S target school without making it a structural lay-on to any operating secondary school?
2. How can appropriate human relations activities and development become part of a school's regular operation?
3. What follow-up structures to changeover workshops are most appropriate to keeping the school moving toward its target plan.

Appendix O lays out the general plans for the project's involvement with Winnequah School along with a timeline. This plan was to be further developed and implemented as the work moved into a refinement stage of changeover. However, the funding cutback from NIE came during March and April so this work was not completed. The IGE/S Project was phased out and an announcement was sent to all involved schools (see letter in Appendix P).

To pull things together, it was agreed to have a one-day wrap-up inservice in June 1976 for all Winnequah School personnel. The agenda for this inservice is given in Appendix O along with the results of the meeting. Generally the school faculty agreed to keep the teacher-advisor program and the U.S.S.R. program going for the following year. The final parent conference plan was to be implemented as per the recommendations of the parent conference task force. The flexible schedule recommendation of a block schedule was rejected because of the staffing cutbacks; no decision was made on the clubs.

VII

CLASSROOM PROGRAMS

Involvement with Winnequah Middle School occurred on three levels. Initially the IGE/S staff concentrated on the total school-wide involvement during the pre-school August workshop. At this time IGE/S staff, Winnequah School staff, parents, and students were brought together to discuss program planning and implementation for the 1975-76 academic year. It was at this time that the faculty committed itself to the development of programs aimed at reaching individual student needs through five task forces on Uninterrupted Sustained Silent Reading Program, the Teacher-Advisor Program, clubs, flexible scheduling, and parent conferences. This total schoolwide involvement occurred again, at the end of the year when all were brought together to plan for the next academic year--that is, to determine which programs should be continued, improved, or disbanded.

The next level of involvement occurred within the five task forces which consisted of faculty, administrators, parents, and students who were intensively involved with planning, implementing, and improving each of the task groups. At this level there was continuous IGE/S staff input and observation of the progress.

The third level of involvement occurred within the classroom. It was believed by the IGE/S Project facilitator that there were four essential purposes of student education and learning which could be developed through the use of IGE/S processes and techniques. These four purposes were

1. To increase student choice in daily classroom activities.
2. To increase variety in day-to-day operations for each learner, which, in turn, affects motivation.
3. To improve communication between teachers and students and among students in order to develop not only a more humane learning environment, but also to increase teacher and student perception of learning progress being made.
4. To provide more appropriate student prescriptions.

It was felt that the IGE/S Project with its comprehensive, purpose-related planning approach would enable students, with the aid of a facilitator-teacher, to interact in planning and executing their own learning programs. The IGE/S planning strategy allows for student determining of purposes for their learning programs, developing alternatives in order to meet selected purposes, and laying out target plans to enable each student to manage and complete a project or learning activity.

The specific purposes of the IGE/S facilitator for classroom level improvement include:

1. Having the opportunity to actually facilitate the planning process in various subject areas and classroom environments.
2. Comparing differences and similarities among different subject and classroom groups to determine effective qualities and strategies of the IGE/S process.
3. Using the IGE/S planning process directly with students and the classroom teachers rather than schoolwide.
4. Having the opportunity to observe which qualities and concepts a teacher who has been directly exposed to the processes may incorporate back into the classroom operation.
5. Having the opportunity to observe transfer results of IGE/S concepts and processes that students incorporate into their classroom programs.

The IGE/S facilitator became intensely involved with three teachers over a three-week period: two sixth grade teachers--one in the area of language arts and the other in social studies--and one Spanish teacher who wanted assistance with two different seventh grade Spanish sections.

To each teacher the IGE/S facilitator submitted a "Statement of Purpose" and "A Sequence of Activities." During each of the four class periods the facilitator interacted with the students to determine purposes for learning the subject area and then, with the assistance of the students, arranged these purposes hierarchically. Next a "Planning Helper," which functioned as a tool for planning assistance, was distributed to each student. This document enabled students and teachers to maintain quality control of planning and execution of programs. From this document each student was able to develop a project to present to the class. At the end of the presentation student reaction to the intervention was obtained by asking what worked and what didn't work. Copies of proposals, planning helpers, and results appear in Appendix Q.

Observations made by the facilitator during this three-week period include the following:

1. The Spanish teacher, who went through the entire strategy twice, really found the purpose hierarchy to be an effective method to expand the realization of students regarding the significance of studying Spanish.
2. Adequate time was a significant factor. Students needed at least 50 minutes to really get into the planning implementation and sharing of individual projects.
3. Reinforcement of the processes is essential to allow for transference of concepts and strategies.
4. Teachers with an open approach to learning more quickly see the value of purpose hierarchies, planning helpers, and student self evaluation.
5. Students need reinforcement of concepts and strategies in order to carry out their own independent projects--at first it all is mechanical to them.
6. All the teachers viewed the planning of programs through use of purpose hierarchies and decision making awareness and control as useful.

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APPENDICES A-Q ARE AVAILABLE FROM THE
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APPENDICES

A. Assumptions of IGE-Secondary
B. Report of the Ad Hoc Committee on the Middle School
C. Sample School Memos
D. Memorandum of Agreement
E. Course Overview and Announcement
F. Illustration of IGE/S Planning Process
G. Daily Record of Winnequah Workshop
H. Workshop Results
I. IGE/S General Objectives in Working with a Demonstration School and Assessment
J. Winnequah Evaluation Program
K. External Participant Observer Evaluation and Interviews
L. Task Force Results
   (A) U.S.S.R.
   (B) Teacher Advisor
   (C) Flexible Schedule
   (D) Clubs
   (E) Parent Conferences
M. Agenda for Assessment Meeting and Comments on the Task Force Efforts
N. IGE/S Evaluation Plan and Discussion Summary
O. Timeline of R & D/Winnequah Involvement and Letter Regarding Phase Out of the IGE Secondary Project
P. Agenda for Wrap-up Inservice Meeting and Results
Q. Proposals, Planning Helpers, and Results of Classroom Involvement

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